

IN THE CLAIMS:

1 1. (Currently Amended) A financial services outsourcing method for facilitating out-
2 sourcing of tax return preparation services for numerous clients on behalf of a direct ser-
3 vice provider serving the numerous clients, the financial services being outsourced to a
4 given outsourcing group, the clients comprising a first set of clients in a first country,
5 having tax return filing obligations for the first country, and comprising a second set of
6 clients in a second country having tax return filing obligations for the second country, the
7 method comprising:

8 for the direct service provider, loading, onto a remotely accessible part of a host
9 server, client specific financial files and corresponding reference materials, the host
10 server providing access to a remote computer client of information concerning the client
11 specific financial files and corresponding reference materials;

12 ~~preparing tax returns for the clients of the direct service provider by outsourced~~
13 ~~personnel, the outsourced personnel located outside the first and second countries;~~

14 providing the outsourced personnel with limited screen shot access to the host
15 server connected through a remote limited access client located outside the first and sec-
16 ond countries, wherein the direct service provider has control of the host server and the
17 client specific financial files and corresponding reference material pertaining to a given
18 tax return loaded thereon; and,

19 preparing tax returns for the clients of the direct service provider by outsourced
20 personnel, the outsourced personnel located outside the first and second countries and
21 utilizing the limited screen shot access of the client specific files and corresponding ref-
22 erence material on the host server; and

23 monitoring and reporting to the direct service provider a status of the tax returns
24 return preparation during the tax return preparation performed by the outsourced person-
25 nel, wherein the direct service provider can obtain a status report in response to a status
26 change occurring with the tax return preparation.

- 1 2. (Original) The method according to claim 1, wherein the tax return preparation ser-
2 vices comprise individual tax return preparation services.

- 1 3. (Original) The method according to claim 1, wherein the tax returns are outsourced
2 through an intermediary firm to the outsourced personnel.

- 1 4. (Previously Presented) The method according to claim 3, further comprising the inter-
2 mediary firm interacting with the outsourced personnel through use of a servicing com-
3 puter system, and interacting with the plural direct service providers through use of the
4 servicing computer system.

- 1 5. (Original) The method according to claim 3, wherein the direct service providers com-
2 prise accounting firms.

- 1 6. (Cancelled).

- 1 7. (Previously Presented) The method according to claim 1, wherein the host server com-
2 prises a CITRIX server.

- 1 8. (Cancelled).

- 1 9. (Cancelled).

- 1 10. (Original) The method according to claim 1, wherein the host server comprises an
2 ASP server running tax software for use by plural independent direct service providers
3 provided with access to the ASP server.

- 1 11. (Original) The method according to claim 2, wherein the host server comprises an
2 ASP server running tax software for use by plural independent direct service providers
3 provided with access to the ASP server.

- 1 12. (Original) The method according to claim 1, wherein the corresponding reference materials comprise image files of physical reference materials.
- 1 13. (Original) The method according to claim 1, wherein the client specific financial files and corresponding reference materials comprise tax filer specific tax file and image files.
- 1 14. (Original) The method according to claim 13, further comprising loading onto the remotely accessible part of the host server tax preparation software.
- 1 15. (Original) The method according to claim 1, wherein the outsourced personnel prepare tax returns while located in India.
- 1 16. (Previously Presented) The method according to claim 1, further comprising the direct service provider interviewing a tax filer and obtaining supporting documentation for the tax filer's tax return.
- 1 17. (Original) The method according to claim 16, wherein the direct service provider comprises an accounting firm.
- 1 18. (Original) The method according to claim 16, wherein the supporting documentation comprises the last season tax return as filed, receipt, and summary information regarding finances of the tax filer.
- 1 19. (Previously Presented) The method according to claim 18, further comprising the direct service provider setting up a tax file compatible with a given tax software package, and rendering the supporting documentation electronic.
- 1 20. (Original) The method according to claim 19, wherein rendering the supporting documentation electronic comprises scanning supporting documents into image files.